

## **IDEA Funding “Carry-Over” Policy Change**

In 2009-2010, LEAs were allowed to carry over more than 25% unspent IDEA funds into the 2010-2011 fiscal year without requesting a waiver. We have determined we will extend the policy; however, LEAs should be aware of two requirements.

- 1) All grant funds must be claimed within 27 months of the award. LEAs that carry over funds from one fiscal year to the next must monitor spending to ensure the amount carried over is claimed within the required timeline or risk losing unspent funds.
- 2) LEAs must submit claims at least quarterly. The waiver requirement was put in place to ensure LEAs spend IDEA funds on a timely basis. With the advent of ARRA, the DPI initiated web-based IDEA claims and required LEAs to submit claims for IDEA funds at least quarterly. These changes are designed to ensure IDEA funds are spent timely.

## **FY 2009-10 Carry-Over Fund Amounts Posted**

It has come to our attention that a message was never sent to LEAs that fiscal year 2009-2010 carry-over amounts were posted to the IDEA budget software. To view these amounts, log into the IDEA budget software and click on the hyperlink “Maintain Budget Funding Amounts” on the IDEA budget main menu to view the amount posted as carry over. If you are concerned about the amounts posted, please contact Nancy Fuhrman at [nancy.fuhrman@dpi.wi.gov](mailto:nancy.fuhrman@dpi.wi.gov).

## **IDEA Budget Contacts – ARRA**

Please take a moment to check the contacts that are listed in your LEA’s ARRA budgets. The software did not require LEAs to enter updated contact information for 2010-11, so the only contact information we can access is the names and phone numbers that were entered previously. To view the contact information, log into the IDEA budget software and click on the hyperlink “Update District Budget Contact Information” on the IDEA ARRA budget main menu.

## **IDEA Funds and Open Enrollment Tuition**

As the School Financial Services Team is auditing the PI 1505 Special Education Annual Report, it is apparent some districts are using IDEA funds to pay for the base amount of the open enrollment tuition. The base amount is considered the “regular education open enrollment amount.” IDEA funding may only be used for the “additional student specific special education amount” of open enrollment tuition. Entities should ensure that 2010-11 IDEA budgets and claims reflect this requirement. To access information related to this requirement, go directly to <http://www.dpi.wi.gov/sms/doc/ufbsped.doc>. Questions regarding this requirement may be directed to your LEA’s LPP consultant or to Lori Ames at 608-267-3749 or by email at [lori.ames@dpi.wi.gov](mailto:lori.ames@dpi.wi.gov).

## **Introducing New DPI Special Education Fiscal Staff**

We are very pleased to announce that Lori Ames, formerly of DPI’s School Financial Services Team, has joined the Special Education Team as an additional fiscal monitoring consultant. Many of you may have worked with Lori in the past regarding state special education categorical aid (Michele Tessner is now handling state special education categorical aid). Prior to working at DPI, Lori was a district business manager. We believe that her district experience will help strengthen the connections we are building between special education programming and fiscal operations. Lori’s contact information is [lori.ames@dpi.wi.gov](mailto:lori.ames@dpi.wi.gov) and 608-267-3749.

We are also very pleased to announce that Jack Marker, who previously worked on the Special Education Team in the procedural compliance area, has returned to the team to take on the responsibilities of the ARRA – IDEA consultant. Jack will be working on ARRA - IDEA fiscal compliance, including coordinating the required 1511 certification of remodeling and construction projects and the vendor/jobs impact surveys that are sent out during each reporting period. His contact information is [jack.marker@dpi.wi.gov](mailto:jack.marker@dpi.wi.gov) and 608-266-3928.